

Retention and Classification Report

Agency: Department of Administrative Services (270)

P.O. Box 141002
3120 State Office Building
Salt Lake City, UT 84114-1002
801-538-3215

Records Officer Marilee Richins

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AGENCY: Department of Administrative Services

SERIES: 27028

3

TITLE: Activity Reports

DATES: 2008-

ARRANGEMENT:

DESCRIPTION:

This series contains weekly activity reports that track the productivity of employees within all divisions of the Department of Administrative Services. Individual reports are received from each division and are then compiled to create these reports, which are then forwarded on to the Governor's Office. These include key developments; personnel issues; litigation issues; debt collection statistics as well as other fiscal information; information from the energy sections of both DFCM and Fleet Operations; microfilm, processing, and analyst statistics from Archives; project development information; information on employee participation in conferences, forums, and trainings; and any highlights or key measurements that more clearly illustrate the productivity of Department employees.

RETENTION:

Retain 1 year.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 48.

AUTHORIZED: 11/17/2008

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year or until administrative needs end, whichever is first, and then destroy.

AGENCY: Department of Administrative Services

SERIES: 27028

TITLE: Activity Reports

(continued)

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Protected. UCA 63G-2-305 (3), (4), (6), (16), (17), (24), (25)

AGENCY: Department of Administrative Services

SERIES: 13438

3

TITLE: Administrative files

DATES: 1982-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These files document the activities of the Department of Administrative Services regarding Worker's Compensation, User Advisory Committee, Division Directors' Meeting, and other miscellaneous meetings.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 59.

AUTHORIZED: 03/02/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until administrative need ends and then transfer to State Records Center. Retain in State Records Center for 3 years and then transfer to State Archives with authority to weed.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

Administrative Historical

Disposition based on the value of these records documenting the decisions, activities and functions of the agency.

AGENCY: Department of Administrative Services

SERIES: 13438

TITLE: Administrative files

(continued)

PRIMARY CLASSIFICATION:

Public UCA 63G-2-301 (2008)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Administrative Services

SERIES: 83708

3

TITLE: Annual reports

DATES: 1981-1983, 2008-

ARRANGEMENT: Chronological by date.

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

The Department of Administrative Services Annual Report functions as the official publication of the agency's preceding year's activities. Its contents include the major goals and accomplishments that the department achieved, an illustration of each division's activities, and an outline of future prospects and projects. Unlike other agency reports, this one does not contain a budget and disbursement schedule.

RETENTION:

Retain until administrative need ends.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 25.

AUTHORIZED: 12/08/1988

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in State Archives permanently with authority to weed.

Paper copy: Retain in Office until administrative need ends and then destroy.

AGENCY: Department of Administrative Services

SERIES: 83708

TITLE: Annual reports

(continued)

APPRAISAL:

Administrative Historical

Disposition based on the value of these records in documenting agency achievements, policies, procedures, and function.

PRIMARY CLASSIFICATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Administrative Services

SERIES: 12364

3

TITLE: Employment applications

DATES: 1991-

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

Applications of those persons qualified to be listed on a register but who were not selected as the candidate for employment. If DHRM has officially delegated a particular state agency as the record copy office then they should retain these applications for three years.

RETENTION:

Retain 3 years after hiring decision is made.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 11, Item 12.

AUTHORIZED: 07/19/1993

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until hiring decision is made and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

Administrative

AGENCY: Department of Administrative Services

SERIES: 12364

TITLE: Employment applications

(continued)

PRIMARY CLASSIFICATION:

Private UCA 63G-2-302 (1)(e) (2008)

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Department of Administrative Services

SERIES: 83359

3

TITLE: Executive correspondence

DATES: 1984-

ARRANGEMENT: chronological

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

This is the executive correspondence of the administrative offices of the Department of Administrative Services.

RETENTION:

Retain 5 years. Transfer to Archives.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 61.

AUTHORIZED: 03/26/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Fiscal

AGENCY: Department of Administrative Services

SERIES: 83359

TITLE: Executive correspondence

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Department of Administrative Services

SERIES: 83710

3

TITLE: Fair employment practices brochures

DATES: 1985-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION:

DESCRIPTION:

Fair Employment Practices brochures are published to educate state employees on employment policies. They contain specifics on state procedures and programs to enhance the work environment, thus increasing productivity. Holdings: ca1985 (1 volume).

RETENTION:

Retain Archives custody.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 25.

AUTHORIZED: 04/02/2003

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in State Archives permanently with authority to weed.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

AGENCY: Department of Administrative Services

SERIES: 83710

TITLE: Fair employment practices brochures

(continued)

APPRAISAL:

Administrative

Disposition based on value of these records in documenting communications to employees on fair employment practices and procedures over time.

PRIMARY CLASSIFICATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Administrative Services

SERIES: 9777

3

TITLE: Fixed asset inventory

DATES: 1985-

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

File used to track and control capital outlay such as office equipment (chairs, typewriters, etc.) and other fixed assets including tools, machinery, and other large equipment.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 27.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Department of Administrative Services

SERIES: 9776

3

TITLE: Interdepartmental transfer requests

DATES: 1982-

ARRANGEMENT: None

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

An accounting document that requests the transfer of funds between agencies for services rendered or materials purchased.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 26.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public UCA 63G-2-301 (2008)

AGENCY: Department of Administrative Services

SERIES: 26126

3

TITLE: Invoices

DATES: 1999-

ARRANGEMENT: Alphabetical by vendor name.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

This series documents requests from state agencies to pay vendors for supplies and/or services that vendors have provided to the state agencies.

RETENTION:

Retain 7 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 53.

AUTHORIZED: 02/16/2006

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after end of fiscal year in which records were initiated and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: Department of Administrative Services

SERIES: 9780

3

TITLE: Leave adjustment reports

DATES: undated

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

Shows all leave adjustments made during a pay period. Shows category of adjustment, the amount, social security number and name.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 10.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public Eighteen personal data elements identified by the State
Records Committee

SECONDARY CLASSIFICATION(S):

Private

AGENCY: Department of Administrative Services

SERIES: 9782

3

TITLE: Payroll registers

DATES: 1984-

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

Display of earnings, deductions, and taxes, providing net income, warrant or direct deposit information. These documents are prepared and used for payroll disbursement.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 30.

AUTHORIZED: 07/20/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

AGENCY: Department of Administrative Services

SERIES: 9782

TITLE: Payroll registers

(continued)

PRIMARY CLASSIFICATION:

Public Eighteen personal data elements identified by the State
Records Committee

SECONDARY CLASSIFICATION(S):

Private

AGENCY: Department of Administrative Services

SERIES: 9799

3

TITLE: Personnel files

DATES: 1988-

ARRANGEMENT: Alphabetical by surname.

ANNUAL ACCUMULATION:

DESCRIPTION:

Complete work history of individual while employed by the State. Refer to UCA 67-18-1, et seq. When an employee transfers to another state agency, the official personnel file must be sent to the new agency. File should include current information on performance evaluations, performance plans, position description, career mobility agreement, insurance benefits notification (ADNT-1), job swap agreement, and overtime agreement where applicable. Also contains application for employment, employees' social security card (copy), Notice of personnel action (DHRM 33), Human resource profile/events (DHRM 34), Termination form (DHRM 35), Employment eligibility verification form, Exit interview form, New employee orientation self-guide, and retirement/deferred compensation plan notification (ADNT-2). May contain documentation on employee withholding, completion of course certificates, conflict of interest letters, incentive award results, letters of commendation, leave records, health records, and leave adjustment reports.

RETENTION:

Retain 65 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 11, Item 2.

AUTHORIZED: 06/25/1991

AGENCY: Department of Administrative Services

SERIES: 9799

TITLE: Personnel files

(continued)

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until employee leaves, retires, or is terminated and then transfer to State Records Center provided employee has not transferred to another agency. Retain in State Records Center for 65 years and then destroy.

Microfiche master: Retain in Archives for 65 years and then destroy.

APPRAISAL:

Administrative

Disposition based on administrative value of personnel records which reflect performance and related issues.

PRIMARY CLASSIFICATION:

Public UCA 63G-2-302(1)(e) (2008)

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-301 (2008)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2015.

AGENCY: Department of Administrative Services

SERIES: 9781

3

TITLE: Position change requests and authorizations

DATES: 1982-

ARRANGEMENT: none

ANNUAL ACCUMULATION:

DESCRIPTION:

Documents used to create new positions, abolish old ones and change existing state employee positions. Common name DHRM 9.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 11, Item 37.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

Microfiche master: Retain in Archives for 3 years and then destroy.

Microfiche duplicate: Retain in Archives for 3 years and then destroy.

APPRAISAL:

Administrative

Disposition based on value of records in documenting agency decisions, actions and functions.

AGENCY: Department of Administrative Services

SERIES: 9781

TITLE: Position change requests and authorizations

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Department of Administrative Services

SERIES: 9779

3

TITLE: Preliminary payroll printouts

DATES: 1984-

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

Computer produced, two part documents sent by Finance to agencies to record final corrections or adjustments regarding employees' pay. They are made before the master payroll file is run and checks are issued. Preliminary payroll files do not serve as time and attendance records.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 16.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 months and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public Eighteen personal data elements identified by the State
Records Committee

SECONDARY CLASSIFICATION(S):

Private

AGENCY: Department of Administrative Services

SERIES: 9778

3

TITLE: Travel reimbursement requests

DATES: 1985-

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

Documents request made by traveler for reimbursement of out-of pocket expenses.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 7, Item 45.

AUTHORIZED: 06/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 3 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Department of Administrative Services

SERIES: 9778

TITLE: Travel reimbursement requests

(continued)

SECONDARY CLASSIFICATION(S):

Private. Home address, social security number, and telephone number

AGENCY: Department of Administrative Services

SERIES: 85074

3

TITLE: Warrant requests

DATES: 1981-

ARRANGEMENT: none

ANNUAL ACCUMULATION:

DESCRIPTION:

See General Retention Schedule 1988:6:49.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 08/1988

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative Fiscal